R&I EXCLUSIVE: 1986 TASTES OF AMERI

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DECEMBER 10, 1986

A Cahners publication serving the total foodservice industry

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FOOD COURTS

Food Courts Face Fine-Tuning

Tenants' operating costs cutting too heavily into profit margins.

The popularity of shopping-mall food courts appears to have peaked, so shopping-center management is trying to fine-tune foodservice operations in hopes of solidifying business.

Harold Carlson, publisher of the CARLSONREPORT for shopping-center management, says he has seen some astute center managers close down food-court operations and spread foodservice throughout the mall to create cross-traffic for operators.

Carlson has identified other problems facing food-court landlords and operators in the coming months.

Chain growth: In what started out as an independent's market, fast-food chains are popping up more and more in food courts. It is one way landlords assure themselves of staying power in a tenant. But Carlson perceives chains as "neutron bombs" in a shopping-center food court. "They are so dominant that kids are going to gravitate there," says Carlson. "Their pricing structure is geared to a small profit on big volume. But the independents can't operate that way."

Price sensitivity: Carlson sees this as a growing problem because he does not see occupancy costs in food courts coming down. But if failures increase, landlords will have to react. Rather than saddling the food-court operator with all the extra occupancy costs, costs can be spread among all mall tenants. After all, food courts keep customers in the mall longer.

Too many choices: With the wide assortment of products, customers sometimes have too many choices. Decisions are hard to make, or not made at all. Carlson is beginning to hear "smaller is better than bigger." By cutting the number of units to seven or eight instead of 12 to 15, consumers' decisions are easier to make.

Burdensome operating costs: There are costs unique to food courts. Common busing is a big problem because operators insist they can handle the job better than expensive mall crews by cross-utilization of their own labor staff.

Health concerns: By digging deeper into a less-qualified labor pool, there is a greater degree of carelessness in handling of products. Carlson also says there is less supervision and growing concerns about the transmission of AIDS.

Even with these problems, there continues to be a need for food outlets in shopping centers because they offer a competitive advantage. Expect to see more food courts in more centers, particularly with many 15-year-old centers due for remodeling.

—Jeff Weinstein

FOOD COURT SALES

The top 10 food categories at food courts ranked by average reported sales volume.

	'85	'86
Hamburgers $302,955	3	1
Chicken $300,000	2	2
Pizza $296,516	1	3
Cookies $262,516	9	4
Oriental $258,864	4	5
Mexican $238,182	7	6
European $229,167	10	7
Seafood $227,083	13	8
Other $224,653	15	9
Hot dogs $224,603	8	10

Source: CARLSONREPORT, June 1986

The faces of food courts are changing to meet new industry concerns.

TASTES OF AMERICA

■ R&I CONSUMER SURVEY

GOOD NEWS

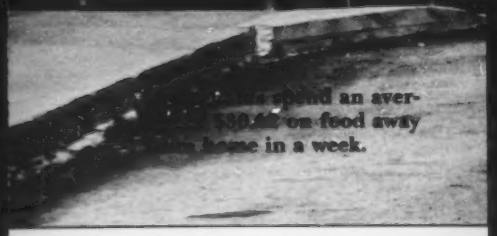
Consumers continue to report that eating out is an essential part of a can't-do-without life style.

Americans love to eat out. And *R&I*'s exclusive "Tastes of America" survey explores their habits, attitudes and choices.

It chronicles the life-style changes that are having a major impact on the foodservice industry. Americans still want to have it all, but how and where they get it appears to be changing.

The country is moving at a fast pace and convenience-oriented operations are cashing in. Americans have fallen in love with video, fueling tremendous growth for takeout and delivery operators. And the working mother continues to be the backbone of industry growth.

The number of *R&I* survey respondents reporting that at least one family member had eaten out in the past week made a dramatic increase in 1986. And



...spend an aver-
...$30.62 on food away
...home in a week.

the outlook for 1987 is encouraging.

As in the past, the survey was conducted for *R&I* by National Family Opinion, a market research firm based in Toledo. Surveys were mailed in early June to 2,000 households that conformed with the latest census data. Tabulation of 1,400 replies began in late July.

The "Tastes of America" report is available from Liz Adams, (312) 635-8800, at the following rates: National Consumer Survey of Eating-Out Habits —$350; National Consumer Survey of Chain Patronage and Preference—$350; Demographic Profile of 74 Individual Chains—$200 per chain; Executive Summary Showing Five-Year Trends—$200; Food-Ordering Demographic Profiles on 53 Different Foods —$200 per food.

—Jeff Weinstein
—Monica Kass

SO WHY ARE TRAFFIC COUNTS FLAT?

While industry analysts tell of flat sales and depressed stock prices in 1986, consumers indicate eating out is more popular than ever. This year, 95% of *R&I* respondents reported at least one family member had eaten out in the past week, up dramatically from 84.1% in 1985. Of those under age 30, 99.4% ate out at least once a week. Even at the low end, 87.9% of those over age 65 ate out in the past week. Consumers spent more of their food dollar away from home this year (26%, up from 24.9% in 1985). They also ate more of their meals away from home (23.7%, up from 22.5% in 1985).

Have you eaten out in the past week?

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TASTES OF AMERICA

In the West, 13.5% of R&I respondents bought gourmet takeout in the past month.

THE TIMES, THEY ARE A CHANGIN'

R&I asked consumers how their eating habits are changing. Here are their answers:

59% are more concerned with nutrition than they were last year.

52.6% eat smaller portions.

31.1% prepare more frozen foods in a microwave.

28.9% skip more meals.

27.7% eat meals without traditional entrees.

16.6% buy more food at supermarket delis.

11.9% eat more frequently.

Eating Out on the Rebound

Eating-out frequency increased 1.4% in 1986 after falling 1.3% in 1985. The outlook for next year appears favorable: 13% of consumers polled plan to eat out more often in 1987, up 1.7% over last year. Of those under 30 years old, 18.3% plan to eat out more often next year. But in the 30 to 39 age bracket, only 10.1% say they will eat out more often next year.

For the fifth straight year, the number of consumers who see eating out as a good value increased. This year, 12.2% say eating out is a good value, compared to 10.6% in 1985.

The comforts of home notwithstanding, 68.5% of *R&I* respondents say eating out is a very enjoyable experience, up from last year's total of 66.7%. Staying at home and ordering food in was very enjoyable for 25.8% in 1986, compared to 22.2% in 1985.

Lunch Scores with Consumers

Breakfast is no longer the fastest growing daypart. This year 50% of all meals eaten away from home in a week are lunches, compared to 47% in 1985. Breakfast accounts for only 10% of all meals today, down from 12% in 1985. There was no change in the dinner meal, garnering 24.9%.

More business deals are made over a meal this year than last. Business meals accounted for 12.6% of meals eaten out

in a typical week.

And who are consumers eating with? The survey shows that they eat 22.7% of their restaurant meals alone, 21.6% with co-workers, 20.6% with a friend, 16.6% with a spouse, 10.2% with children and 8.7% with a spouse and children.

Full Service Shows Strength

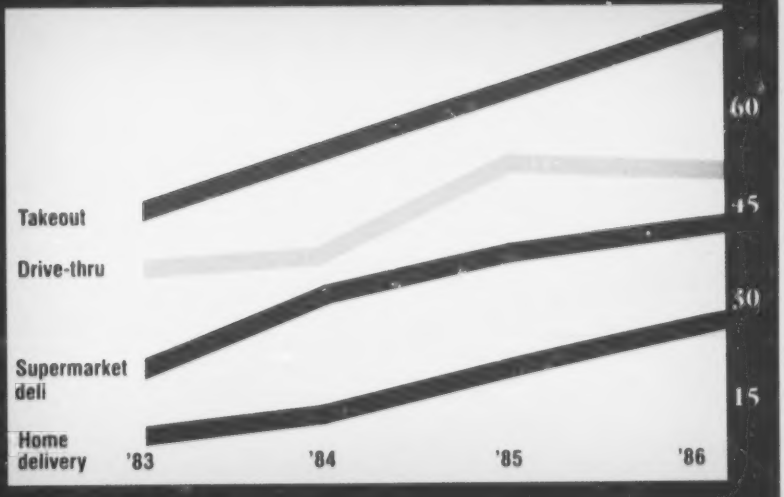
Fast-food restaurants are still the biggest drawing card in the industry: 39.7% of all meals eaten away from home in the average week are purchased there. Full-service restaurants made up some ground by drawing 30.6% of the business after slipping from 31.7% in 1984 to 27.6% in 1985.

continued on page 42

A NEW GENERATION ON THE MOVE

Speed and convenience are important to today's consumer. Consider this: 80.8% of households with four members purchased food for takeout in the past month.

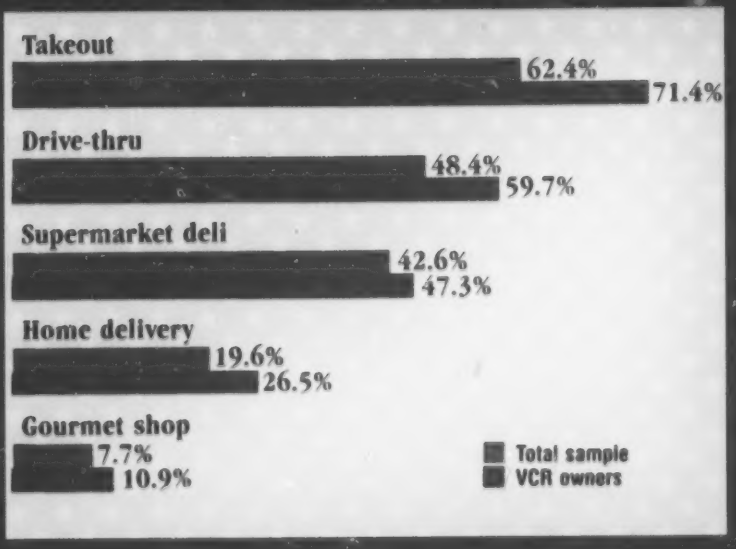
% of respondents who patronized in the past month.



DINING BY VIDEO LIGHT

The video revolution is keeping consumers at home, playing a big part in the growth of takeout, delivery and convenience foods, especially with the under-30 group.

% of respondents purchasing in the past month:



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TASTES OF AMERICA

YOUNG SINGLES SPEND MORE, EAT OUT LESS

Despite the fact that the percentage of meals young singles eat out each week has changed very little (last year 35.8%; this year 37%), young singles are spending 4% more of their food dollar on meals away from home this year than last. Is it any wonder that fewer young singles think eating out is a good value? Last year 9.8% found eating out a good value; this year, 8%.

Young Singles More Tolerant?

Though most singles rate the meals they eat out an average value, operators must be doing something right. More singles find eating out a very enjoyable experience this year than did last (64.6% in 1986 compared with 53.9% in 1985). And young singles are a large part of the reason: Last year, 60.7% of the young singles surveyed very much enjoyed eating out. This year 71.6% found eating out a great experience.

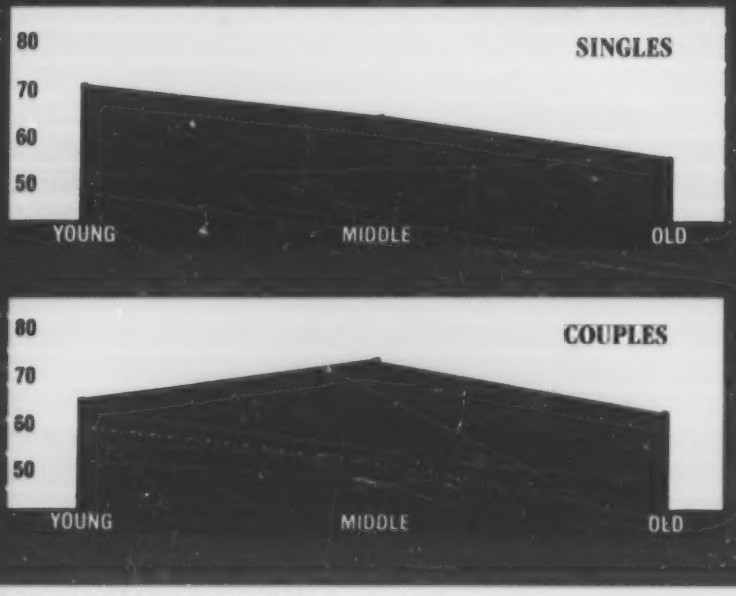
Perhaps singles are becoming more tolerant? Last year, 37.9% of the young singles surveyed complained about menu prices. This year, prices bothered 36%. And while portion size bothered 36.3% of the young singles last year, this year fewer (31.5%) complained.

The same applies for older singles in at least one category: dim light. Either restaurateurs brightened up their establishments this year, older singles' eyesight improved, or they have slipped into a more romantic mode. Only 34.5% were bothered by dim light compared with 47.4% last year. However, older singles were considerably more irritated this year by noisy restaurants. Last year, only 24.6% of the older singles surveyed found noise levels disturbing compared with 32.2% this year.

Singles enjoy eating out more this year than they did last.

EATING OUT: NOT AS FUN FOR OLDER SINGLES

As they age, singles turn off on restaurants, preferring to fix dinner at home or eat at a friend's place. But childless couples' enjoyment of eating out keeps rising until after retirement.



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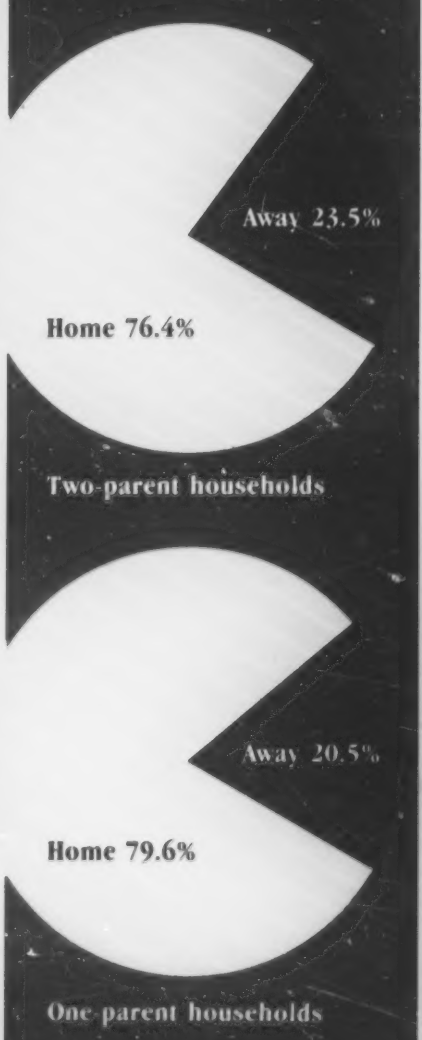
TASTES OF AMERICA

WHO EATS OUT MORE? ONE- OR TWO-PARENT FAMILIES?

The number of single-parent households is steadily increasing. In 1985, seven million single-parent households made up 8% of the total population; up from 4.5% in 1970.



Meals Out with the Kids Increase

There has been an interesting shift in the number of restaurant meals parents eat with their children. In 1985, young parents ate out with the children 26.3% of the time. This year, that figure rose to 45.6%. The same applies to middle parents (head of household under 45; youngest child over 6) who this year shared 45.3% of their restaurant meals with their children, compared with 30.1% last year. But older parents are eating out with the kids a lot less: Percentages dropped from 43.9% in 1985 to 28.6% in 1986.

Middles Not So Middle-of-the-Road

Of the three family groups with children in the household, middle parents seem to be the most dissatisfied with the experience of eating out. While the number of young and older parents who find eating out a very enjoyable experience increased this year, the number of middle parents who enjoy eating out dropped from 74.9% to 70.2%.

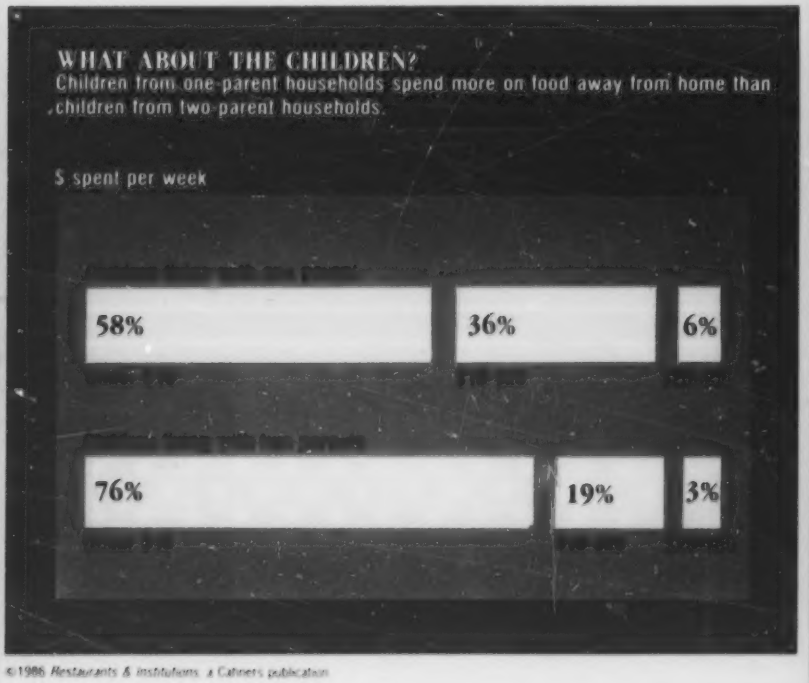
Single-parent households eat out more than two-parent households.

In addition, middle parents spent less money per week on meals away from home this year than they did last year. In 1985, 8.4% of the middle parents surveyed spent less than $10 a week on meals away from home while 43.4% spent $10 to $25. In 1986, 14.9% spent less than $10 while 33.8% spent between $10 and $25.

This year, middle parents seem happier staying at home. *continued on page 50*

WHAT ABOUT THE CHILDREN?

Children from one-parent households spend more on food away from home than children from two-parent households.



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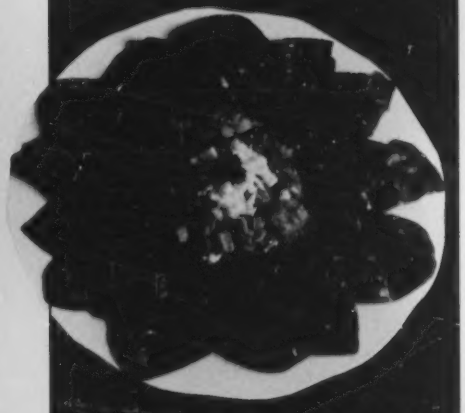


VEGETARIAN IS AS VEGETARIAN DOES . . .

Last year vegetarian food was big with young singles. Twenty-eight percent said they would be interested in ordering it, compared with 17.1% on the average. But either young singles tried vegetarian food and didn't like it or they were short on staying power: This year only 15.7% of the young singles surveyed were interested.

Now older working couples are most interested in vegetarian fare. Twenty percent said they would be interested in ordering vegetarian food if it were available, compared with the 13.7% who were interested last year. And giving this year's pledge of interest some weight, older-working couples ordered salads more frequently than any other group surveyed this year—94.7% compared to the 86.5% average. They also ate fresh vegetables more than the average customer.

Meal Skippers and Fast-Food Fans

Their mothers told them better but . . . young, childless couples prepare more frozen foods in microwave ovens than their elders, skip more meals and omit traditional entrees more frequently. They eat between meals more, too. In answer to a question about changing eating patterns, 16.9% say they are eating more times throughout the day —more than any other group.

Young, childless couples eat more meals (53.2%) in an average week at fast-food restaurants than any other group (39.7% average), order food for home delivery more than any other group (35.4% compared to a 19.6% average) and also are biggest on takeout (80.8% compared with 62.4% average).

Young Couples Least Nutrition-Conscious

They might be eating a lot of salads (46.9% compared to the 41.9% average), but it is probably a gesture to make up for all of the pizza they consume. Seventy-five percent of the young childless couples surveyed eat food from pizza parlors compared with 29.3% of the older-working and 19.3% of the older-retired couples.

Young couples: most fast food.

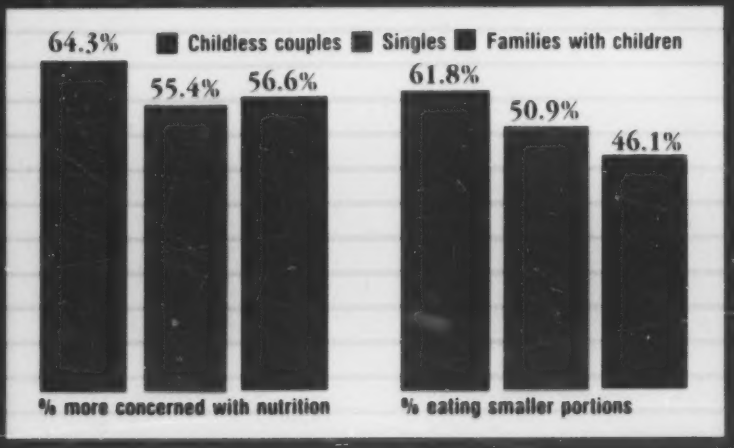
In fact, of the childless couples surveyed overall, young ones are least concerned with nutrition (51.5% compared with a 70.7% combined average of the other two groups). They also spend more per week on meals away from home than do older working or retired couples (18.3% compared with 9.4% combined average).

And what about romance? Most of the meals young couples eat out are shared with co-workers: 33.2%. Meals eaten out with spouses lag behind at 19.9% compared with the 40.5% and 66.1% of restaurant meals older working and older retired couples share.

continued on page 54

COUPLES BIG ON NUTRITION, SMALL ON PORTION

Though young childless couples are less interested in nutrition than their elders, taken as an all-ages-included group, childless couples will order more healthful foods this year than others and will want smaller portions.



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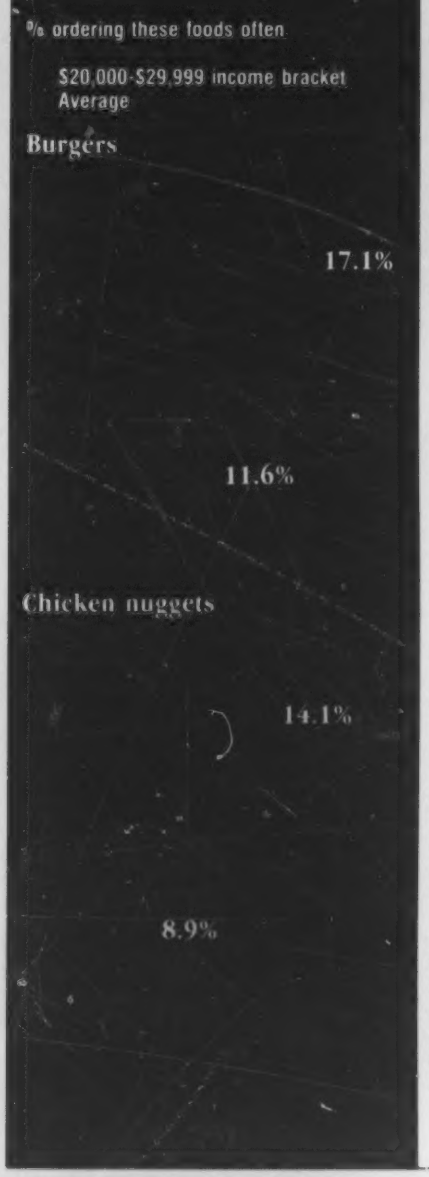
TASTES OF AMERICA

LOWER-MIDDLE HIGH ON FAST FOOD

Customers in the $20,000 to $29,999 income bracket favor fast-food restaurants over full-service (77.3% of the group patronized a fast-food operation in the past week, while only 67.7% patronized a full-service restaurant).



Fast-food restaurants most popular with lower- to middle-income customers.

Mid-Income: Vegetables Yes, but Sweets, Too

Though a significant percentage of lower- to middle-income workers say they are ordering hamburgers and french fries more frequently this year than they did last, the group also is more interested in healthful foods.

Consumers earning less than $29,999 say they are more interested in ordering foods low in fat and cholesterol this year than last (45.6% showed interest last year; 50.8% showed interest this year). Their interest in low-calorie and low-sodium food also is rising. Last year 42.1% said they might order low-calorie foods if they were available; this year 47.5% would.

In fact, this year lower- to middle-income consumers are ordering more salads and vegetables each month than they did last year. In 1985, 38.8% ordered salads in the past month; this year 43.8% did. Last year 17.9% ordered fresh vegetables sometime during the month; this year 21.8% did.

But while they might be increasing the amount of healthful foods they order, the lower- to middle-income group is not giving up desserts. For example, last year 10.1% admitted they had ordered ice cream more frequently than in previous years. This year that figure jumped to 14.2%. And their interest in low-sugar foods might be dropping. Last year 37.5% said they would be interested in ordering low-sugar foods if available. This year 36.6% were interested.

Eating Alone

The number of meals consumers eat alone continues to rise, no matter what their salary. In 1985, 19% of the total meals consumers ate in a restaurant during one week were eaten alone. This year 22.7% were eaten alone.

The two groups eating the most meals alone are the lowest and highest income groups. In one week, consumers making less than $12,500 ate 28.9% of their restaurant meals alone. Customers making $60,000-plus ate 29.4% of those meals alone. By contrast, middle- to upper-middle-income consumers (those who make $30,000 to $44,900) ate 18% of their meals alone.

continued on page 60

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For information circle 17 ⟶

TASTES OF AMERICA

1. Salads
2. Fresh vegetables
3. Fresh fish
4. Decaffeinated coffee
5. Fresh fruit
6. Chicken
7. Shrimp and shellfish
8. Iced tea
9. Oriental food
10. Pizza
11. Mexican food
12. Soups

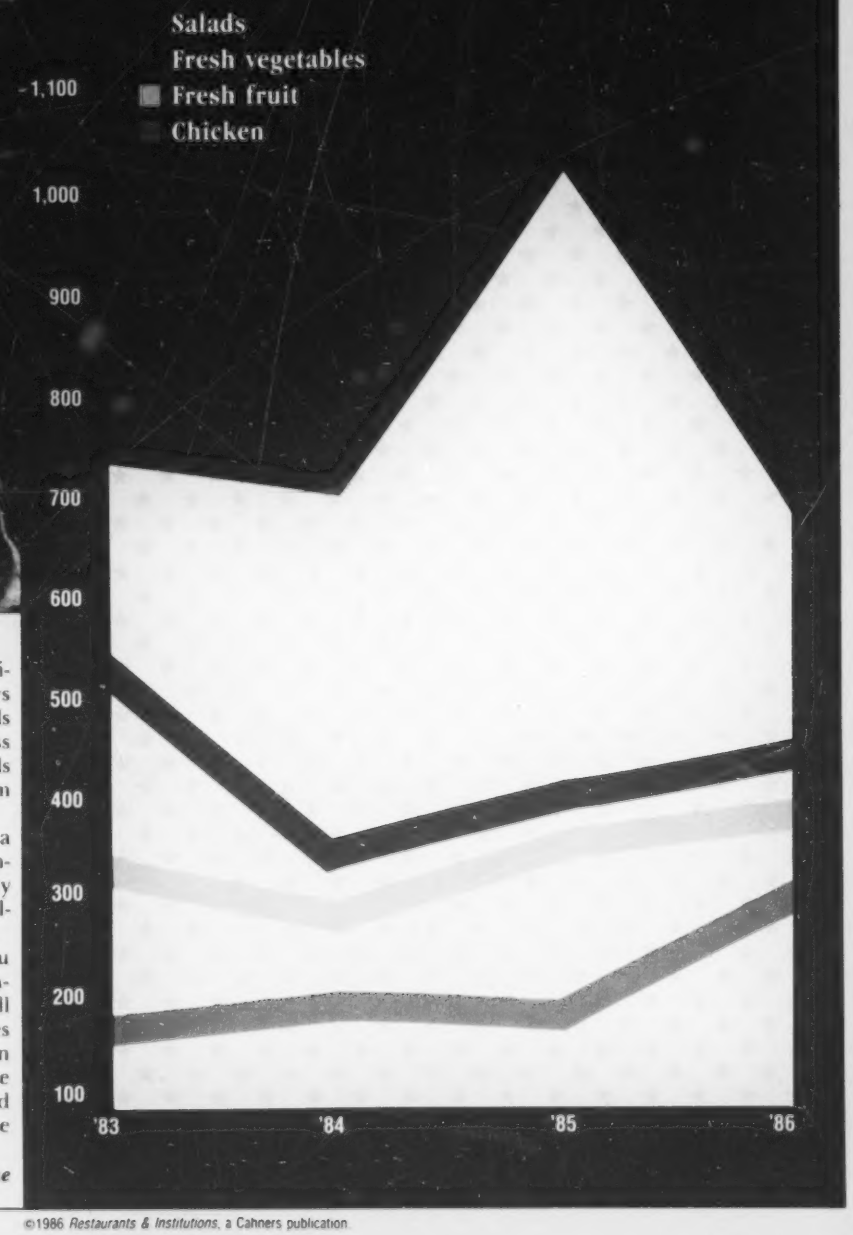
■ R&I CONSUMER SURVEY

AMERICA'S CHOICE IN FOOD
Decisions, decisions: R&I explores moment of truth when consumer meets menu.

RESTAURANTS & INSTITUTIONS

Salad bars: Customers think the price is nice.

HAVE SALADS BEGUN TO WILT?
Still way ahead of other menu items, salad's growth has slowed in the past year. Fresh fruits, vegetables and chicken (high scorers still gaining in popularity) exhibit different stages in their product life cycle. An index of 100 means that equal numbers of respondents say they order a food more often and less often.



Once again *R&I* has asked the American consumer what foods he orders when he eats out, what foods he finds himself ordering more often or less often now than before, and what foods he would order if he could find them on a menu.

And once again, the answers are a paradox: Food choices are at once intensely conservative and capriciously fad driven. They are decisions rationally made and they are totally illogical.

Operators making the daily menu decisions that keep up with this consumer or get one step ahead of him will find much that is useful in the pages that follow. What foods are growing in popularity? Which are slipping? Where are the unmet needs, the unserved niches? Here is a lesson in reading the customer as he reads the menu.

—Robert Keane

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TASTES OF AMERICA

Hamburgers and pizza, among America's most popular foods, are still growing in popularity. Gourmet pizza and specialty burgers, however, were ordered by fewer people this year than last. The best customers for both gourmet pizza and specialty burgers are young singles and couples, particularly the more affluent among them.

Customers Still Crossing the Road for Chicken

Chicken has long been one of America's favorite foods and its popularity continues to grow. This year close to one-third of the population indicated that they were ordering chicken more often than in the past. The greatest growth was among those at the highest income levels, who also tend to eat out the most often. For consumers with incomes greater than $60,000, the Growth Index was 1,059, which indicates that 46% of this segment are ordering chicken more often while only 4.5% are ordering it less.

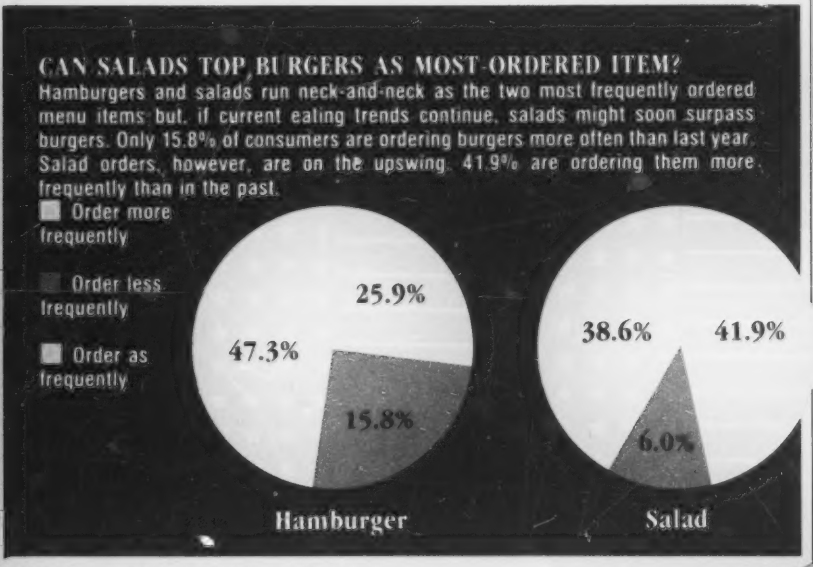
Chicken nuggets and patties have undoubtedly added to the increased popularity. They go over especially well in households with children. More than 16% order these items often.

Pizza's Piece of the Pie Continues to Grow

The proliferation of microwave ovens and VCRs in American households and the availability of home delivery has almost certainly been a factor in pizza's growth this year. Pizza is ordered more than once a month by 44% of microwave owners and 49% of VCR owners. Approximately one-quarter of these consumers indicate that they are ordering pizza more often. *continued on page 70*

CAN SALADS TOP BURGERS AS MOST-ORDERED ITEM?

Hamburgers and salads run neck-and-neck as the two most frequently ordered menu items but, if current eating trends continue, salads might soon surpass burgers. Only 15.8% of consumers are ordering burgers more often than last year. Salad orders, however, are on the upswing. 41.9% are ordering them more frequently than in the past.



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Chicken and fries: a long-running act.

TASTES OF AMERICA

AND IF YOU BELIEVE THIS

Especially popular among consumers who identify themselves as nutrition-minded are shrimp and shellfish, Oriental food and iced tea. Mexican food and soups also are among their favorite menu items. Desserts, however, are virtually off their list—or so they claim.

All That's Good to Eat Is Not Green

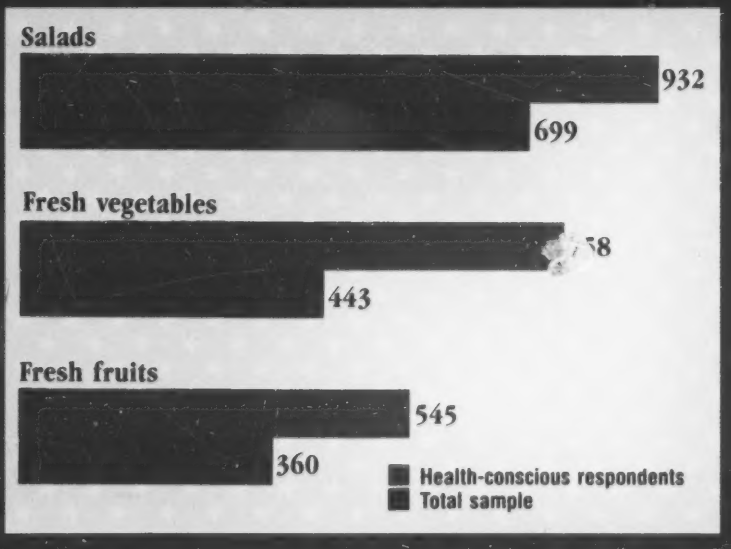
Even among those who say they are more concerned with nutrition than they used to be, the hamburger remains the most commonly ordered food, beating out salads by a small fraction. And no matter what new priorities Americans espouse, when they eat out, they want familiar foods that taste good. Nutrition-conscious consumers order french fries more often than fresh fish, and ice cream more often than fresh fruit or vegetables. Soft drinks are still high on the list.

The nutrition-minded are slightly more likely than the general public to order steak, lamb and other meats when they eat out. They also order more Italian food, regular coffee, soups and sandwiches. So while it might be true that more people than ever are aware of the importance of nutrition and have taken some steps to change their habits, the transformation is far from complete. *continued on page 74*

Fitness buffs choose foods carefully.

HEALTH-CONSCIOUS CUSTOMERS ORDER THE RIGHT STUFF

Respondents concerned with health (now 60% of the total) order fresh fruits and vegetables much more frequently than the average consumer. An index of 100 means that equal numbers say they order a food more often and less often.



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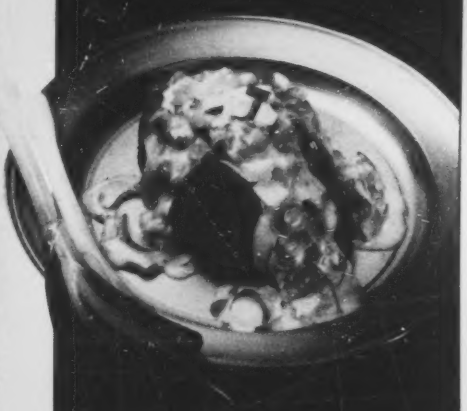
TASTES OF AMERICA



NO HALF-BAKED IDEA

Baked potato entrees were the most frequently ordered of the specialty items tracked by *R&I* this year. They were most popular in the South, whose consumers ordered 40% of all baked potato entrees. They also were well-received at the lower end of the income spectrum. Households with incomes less than $20,000 ordered another 40% of them.

Regional Preferences Still Offer Uncracked Markets

Although they have nationwide following, several regional favorites remain strongest in their home states. One-fifth of *R&I* respondents overall order barbecue sandwiches and sausage biscuits. In the South, more than 31% of consumers choose both items, while in the Northeast less than 10% do.

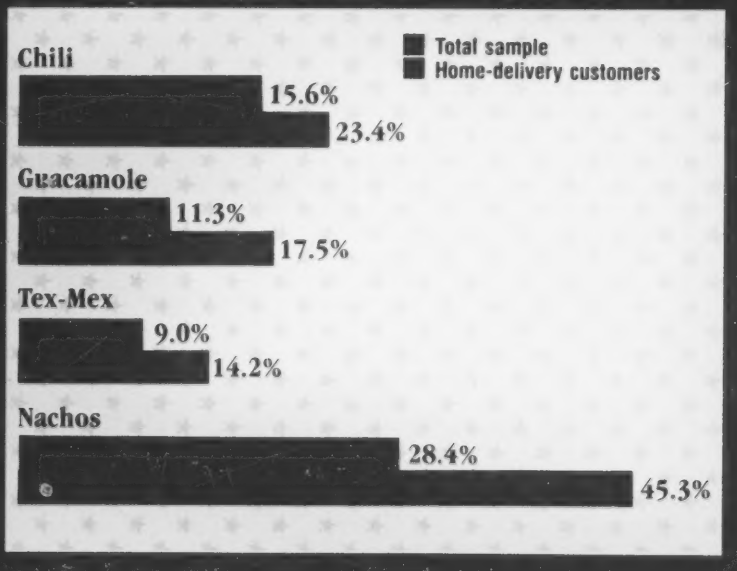
Singles and Parents Order Differently

Singles and parents in the same age group are likely to order different food away from home. Singles choose Cajun food, chicken wings and other spicy fare more than five times as often as parents. Couples with children on the other hand order twice as many baked potato entrees and croissant sandwiches as their single counterparts.

Nachos: once a fad, now a fixture.

A DEMAND WAITING TO BE SUPPLIED

Consumers who buy food for home delivery show more interest in Mexican foods than the average consumer. The typical home-delivery fan is married with children, lives in the Midwest or the South, and makes $20,000 to $45,000 a year.



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LIQUID ASSETS

■ R&I CONSUMER SURVEY

THIRSTS OF AMERICA
Patrons polled on beverage choices say, 'Let there be light'

The health and fitness craze, along with the concerns generated by tough drunken-driving legislation, continue to change the type of beverage alcohol consumers order away from home. For the second year in a row, more than 90% of households in the Tastes of America survey report ordering less alcohol when eating out. Yet there are bright spots for restaurateurs who count on bar receipts to boost profits.

While some patrons might be steering away from hard liquor, many are turning to alternatives such as wine coolers, light beer and specialty non-alcoholic fruity drinks, many of which can carry premium prices. In addition, 7% of consumers say they are ordering dessert—often a high mark-up item—where they would not have in the past.

The survey also revealed a large per-

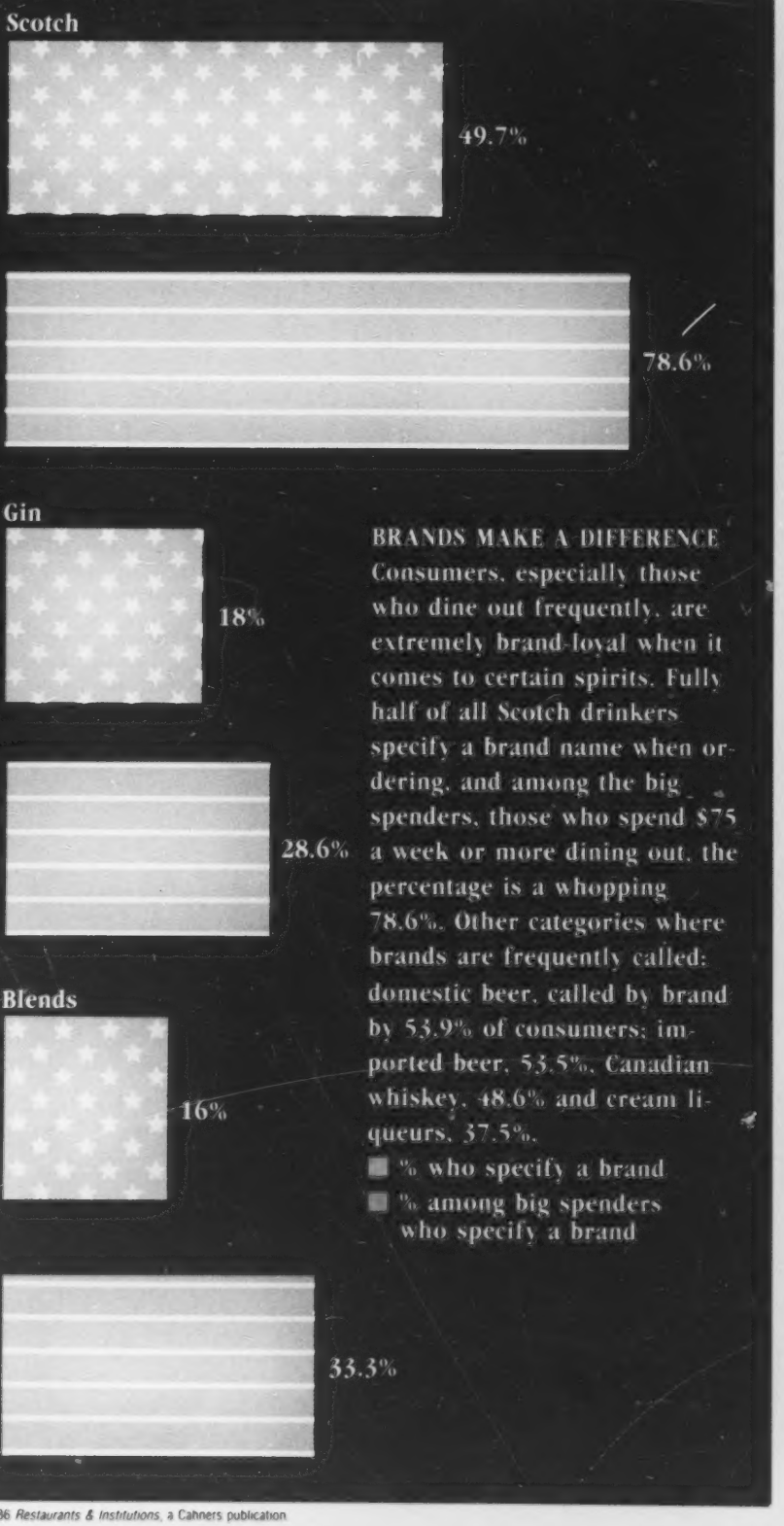
&RESTAURANTS INSTITUTIONS

Young singles spend more on alcohol consumed away from home.

centage of consumers who call a brand name of liquor when ordering a cocktail or mixed drink, particularly those made with whiskey, cordials and liqueurs. This offers another opportunity for operators to recoup some beverage dollars by charging a premium price for called brands.

While most Americans continue to spend more on liquor to be consumed at home than liquor consumed while eating out, operators can target their advertising dollars to young singles, the majority of whom say they spend more away from home than at home. When drinking away from home, friends tend to be the most frequent drinking partner, followed by spouse and co-workers.

—Maureen Pratscher


Scotch
49.7%
78.6%
Gin
18%
28.6%
Blends
16%
33.3%
BRANDS MAKE A DIFFERENCE
Consumers, especially those who dine out frequently, are extremely brand-loyal when it comes to certain spirits. Fully half of all Scotch drinkers specify a brand name when ordering, and among the big spenders, those who spend $75 a week or more dining out, the percentage is a whopping 78.6%. Other categories where brands are frequently called: domestic beer, called by brand by 53.9% of consumers; imported beer, 53.5%, Canadian whiskey, 48.6% and cream liqueurs, 37.5%.
% who specify a brand
% among big spenders who specify a brand

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LIQUID ASSETS

Singles' Bars Really Earn Their Name

Most Americans say they spend more on alcohol to be consumed at home than they do on alcohol purchased when they eat out, but just the opposite is true among young singles. More than 38% of young singles say they spend more away from home, while only 27.6% say they spend more for alcohol at home. The reason? Singles are purchasing more than a beverage to quench their thirst when they drink away from home. They also are buying atmosphere, entertainment and an opportunity to make new friends.

Beer is the type of alcohol most frequently called by brand name.

Wine Coolers Show Biggest Increase

The two clear-cut winners in the survey are light beer and wine coolers. Nearly 22% of light beer drinkers say they are ordering more, compared to 20% who are ordering less. Among wine cooler drinkers, 32% are ordering more, while only 15.9% are ordering less.

"White goods" as the clear spirits such as gin, rum and tequila frequently are called, are ordered more often than the "brown goods," such as Scotch, bourbon and whiskey. But don't discount the continuing popularity of the "brown goods". Nearly ⅔ of bourbon drinkers say they are ordering it as frequently as ever. Moreover the number of consumers ordering brandies, cordials, cognac is increasing. Also noted is the increased orders of flavored vodkas.

continued on page 86

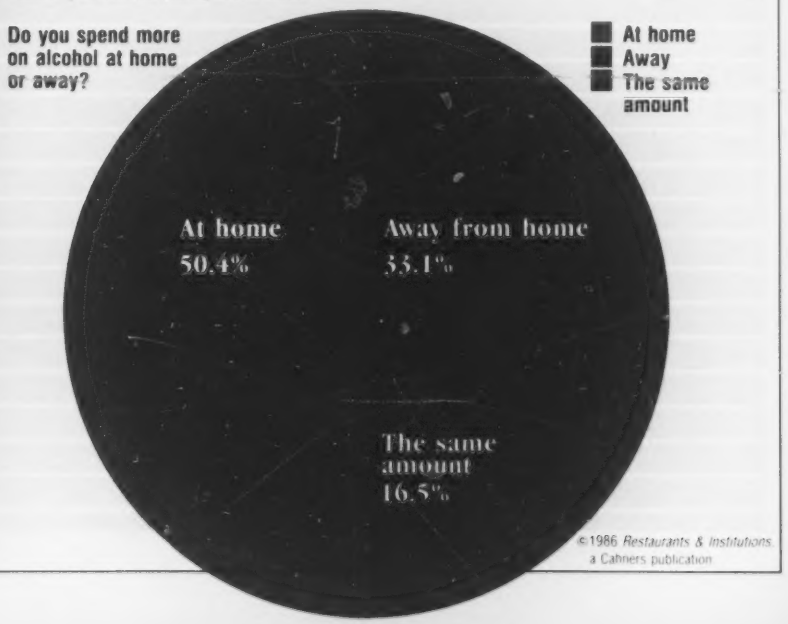
WHITE WINE: THE UNIVERSAL BEVERAGE?

Certain types of alcohol appeal to a larger percentage of the population than others. White wine, for instance, is ordered occasionally by 72.7% of consumers, whereas Scotch is ordered by only 29.1%. Here is a rundown of who orders what alcohol:

72.7% White wine
69.8% Domestic beer
63.9% Red wine
63.5% Light beer
60.3% Vodka
55.3% Imported beer
54.7% Rum
53.3% Wine coolers
52.0% Gin
49.5% Sparkling wine
48.5% Tequila
46.6% Cordials/liqueurs
44.7% Bourbon
44.6% Canadian whiskey
43.7% Cream liqueurs
42.2% Schnapps
41.5% Cognac/brandy
39.8% Blends
29.1% Scotch

DRINKING AT HOME BECOMES MORE PREVALENT

As law enforcement agencies and the courts continue to crack down on drunken drivers, Americans are becoming more cautious about drinking away from home. More than 50% say they spend more on alcohol to be consumed at home than on drinks purchased away from home.



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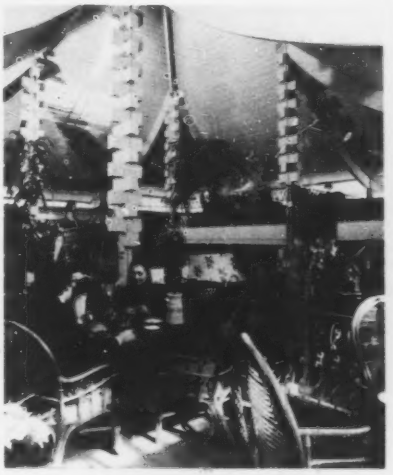
LIQUID ASSETS

SOFT DRINKS SLAKE THIRST

As Americans drink fewer alcoholic beverages, they are turning most frequently to soft drinks as an alternative. Forty-eight percent say they occasionally order a cola or lemon-lime drink instead of a cocktail. Other popular beverage alternatives include wine coolers, cited by 22.9%; sparkling water and club soda, 13.9%; and specialty non-alcoholic drinks, 6%. One surprising find: 7% say they now order dessert where they would not have before.

Executives Share More Drinks with Colleagues

Co-workers hoisting a brew at the corner tavern after the 5 o'clock whistle is a common scene in many television advertisements today. Yet, *R&I*'s Taste of America survey shows that co-workers rank third behind friends and spouses as drinking partners. The practice of sharing a cocktail with a co-worker is slightly more prevalent in the Northeast, where 24.3% say they drink with colleagues. As an employee moves up the corporate ladder, he is also more likely to drink with co-workers, although primarily at business lunches and dinners. Only 12% of those earning less than $12,000 say they drink with co-workers, while the figure is 24.6% for those earning $30,000.

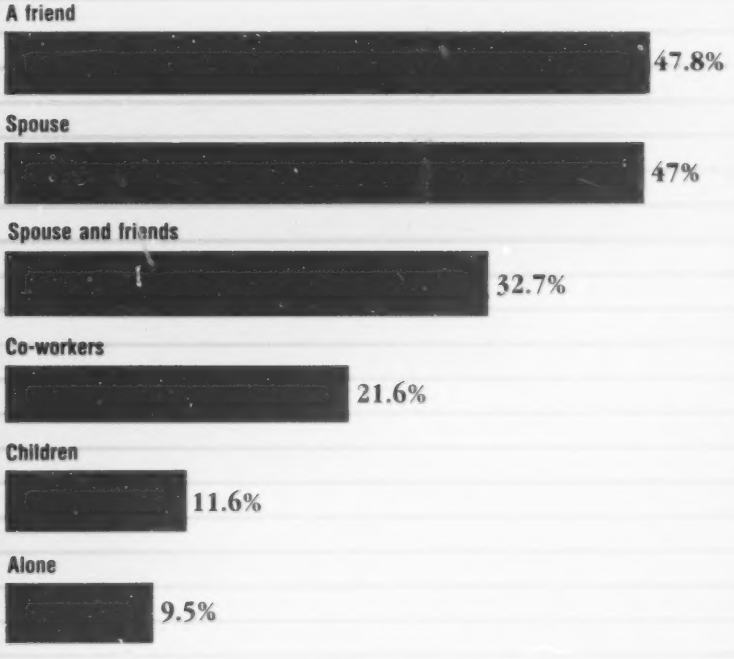


Spouses are frequent drinking partners, second only to friends.

FRIENDS MAKE THE BEST DRINKING BUDDIES

The term social drinking seems to most aptly describe American drinking habits. Nearly half of all respondents say they are with friends when they drink away from home. Less than 10% say they drink alone.

Who are you with when you order alcohol away from home?



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LIQUID ASSETS

ALCOHOL CONSUMPTION CONTINUES TO SHIFT

For the second year in a row, Americans report that they are drinking less than they have in the past. An overwhelming 94% of those answering the survey say their alcohol consumption has declined. Nearly a third of those say the amount of recent publicity about responsible use of alcohol affected the amount they drink when they eat out.

Are you ordering more or less alcohol when you eat out?

New Laws Curb Drinking in Northeast

Legislators in New England have been at the forefront of drunken-driving legislation, banning happy hour in Massachusetts and permitting roadblocks in other states, and the laws they have passed seem to be having the intended effect. Nearly 50% of Northeast residents who say they have decreased their alcohol consumption in the past year say that drunken-driving legislation was a major factor in the decision. Less than a third of those in the South, however, where drunken-driving legislation is slower in coming, say they have decreased their alcohol intake for that reason.

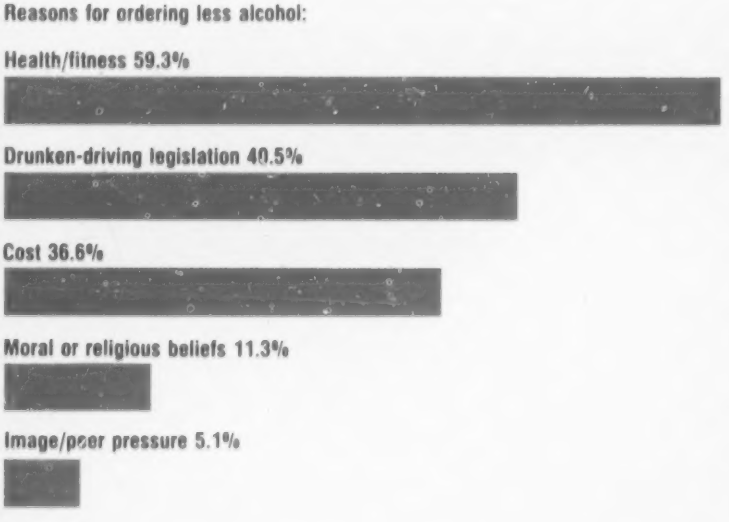
Yuppies Only Group to Increase Consumption

Young couples without children are the only demographic group to show a significant increase in alcohol consumption away from home. Eleven percent of this group say they are ordering more alcohol when they eat out than in the past, compared to only 4.7% for the total sample. The only other group that even comes close is the young singles category, in which 6.6% say they have increased their consumption. The biggest decrease in consumption was noted among young parents, who are more tied to the home and have less disposable income.

While overall liquor consumption is down, certain categories are showing increases.

FITNESS CRAZE CHANGES BEVERAGE CHOICES

Consumers cite a variety of reasons for drinking less alcohol than in the past, but the most common is a concern about health and fitness. Those over 40, particularly, list health as the dominant reason for drinking less.



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LIQUID ASSETS

MADD MAKES A DIFFERENCE
Although their campaign has become less vociferous in the past year, Mothers Against Drunk Driving still can be credited with pushing the issue of drinking and driving into the public spotlight and, in turn, causing a decline in alcohol consumption.

Those in the Northeast, particularly, say the recent publicity about responsible use of alcohol has affected the amount they drink when they eat out. Thirty-six percent of New Englanders say they have been touched by the media accounts.

Young parents also have taken the publicity more to heart than the general population. Forty-two percent say they have been affected by publicity about drinking and driving, as opposed to only 30.4% of the total sample.

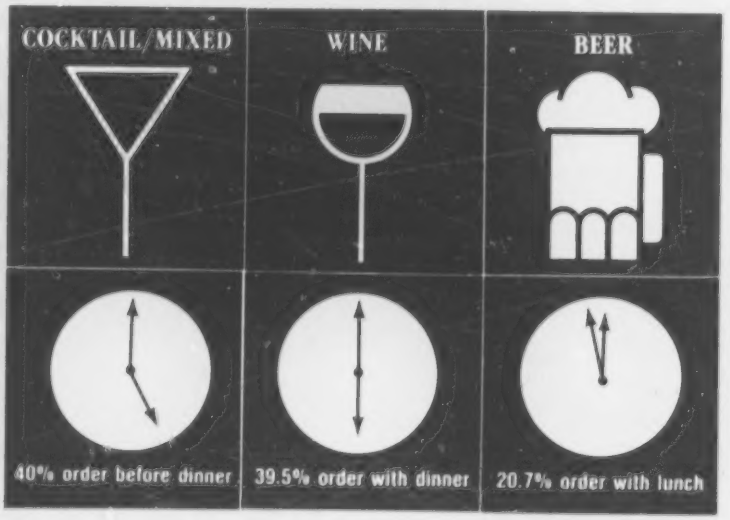
Two out of five big spenders, those spending more than $75 a week eating out, say they, too, have been affected by reports about responsible use of alcohol.

Age, Income Skew Drinking Habits

While beer is the beverage of choice at lunch for most consumers, those who eat out frequently (more than seven times a week) and those who are big spenders (more than $75 a week) opt for mixed drinks. Thirty-one percent of the big spenders say they order cocktails with lunch, while only 17.8% order beer or wine. Wine is the popular pick at dinner among most consumers, but it also is a favorite before dinner with those in the West. Thirty-eight percent of Westerners say they order wine before dinner, compared to only 27.5% of the total. As might be expected, cocktails and mixed drinks, particularly those made with liqueurs, are far and away the most ordered type of alcohol after dinner among all demographic groups except those under 30. For the younger set, beer appears to be the preferred beverage throughout the day. At the other end of the age spectrum, those 65 and older are not as tied to any one beverage.

Eleven percent of young, childless couples say they are drinking more when eating out.

IF THAT'S A BEER, IT MUST BE LUNCH TIME
Americans tend to drink certain types of alcohol at certain times of the day. Beer, for instance, is the favorite at lunch, cited by 20.7% of all drinkers. Cocktails win out as the preferred before-dinner drink, but also are the drink of choice before lunch and after dinner.



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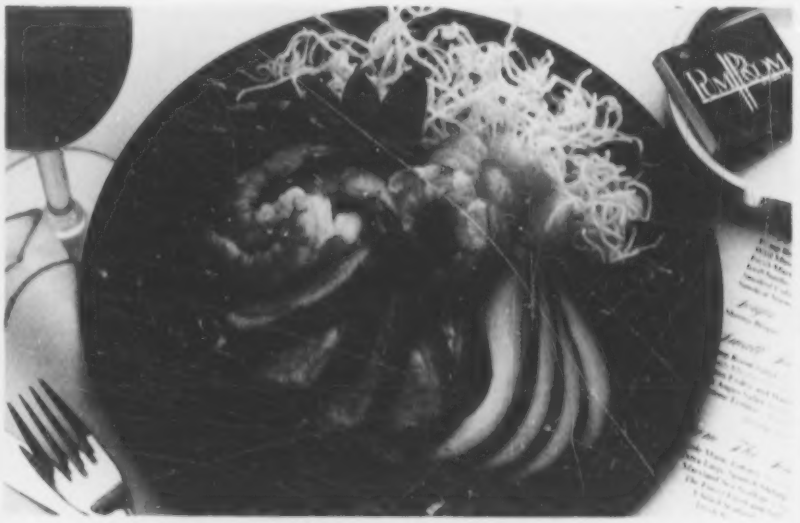

Kabuki Salad is made with fresh ingredients for a main-dish delight.

■ OPERATOR OFFERINGS

Salads Star as Entrees

Lettuce takes center stage in main-course selections.

In these times of light eating, salads have assumed a much more important role on operators' menus. They have moved from side-dish status to a ranking among the main-course entrees. The following are salad recipes from two well-known restaurants, Old Original Bookbinder's, Philadelphia, and The Pump Room, Chicago. —*K.M.*

OLD ORIGINAL BOOKBINDER'S LOBSTER SALAD

Yield: 24 main-dish salads

Lettuce, shredded	7 lb., 8 oz.
Green onions, sliced	9 oz.
Dill weed	2 Tbsp.
Lobster, cooked, cubed	9 lb.
Celery, chopped	1 lb., 8 oz.
Mayonnaise	3 lb.
Tomato wedges	72
Lemon wedges	72
Pimento-stuffed green olives	72

Method: Toss lettuce with green onions and dill weed. Combine lobster, celery and mayonnaise; chill. Place 2 cups lettuce mixture on serving plate. Spoon 1 cup lobster mixture over lettuce. Garnish plate with 3 tomato wedges, 3 lemon wedges, 3 olives and parsley.

KABUKI SALAD

Yield: 24 main-dish salads

Iceberg lettuce, shredded	7 lb., 8 oz.
Chinese rice sticks, fried	1 lb., 8 oz.
Breast of duck, cooked, sliced ¼-in. thick	3 lb.
Shrimp, peeled, cooked	3 lb.
Mandarin orange sections	3 lb.
Snow peas, blanched	1 lb., 8 oz.
Avocados	6
Dressing	recipe follows

Method: Chill lettuce in plastic bag to crisp. To serve, toss 1½ cups lettuce with 2 Tbsp. Dressing. Place on serving dish. Arrange 1 oz. rice sticks around back side of lettuce. Top lettuce with 2 oz. each duck, shrimp and mandarin oranges, 1 oz. snow peas and ¼ avocado, peeled and sliced. Serve with 1 oz. Dressing.

DRESSING

Yield: approximately 1½ quarts

Eggs	4
Rice wine vinegar	1⅓ cups
Soy sauce	1 cup
Vegetable oil	1 cup
Sesame oil	⅓ cup
Ginger	1 tsp.

Method: Combine all ingredients and mix well.

■ R&I DATA

FOOD COST INDEX: FRESH PRODUCE PRICES REMAIN CONSTANT

The *R&I* November Food Cost Index shows fairly consistent prices compared to a month ago. The cost of a pound of tomatoes remains steady at 52 cents. Strip steak and hamburger prices dipped slightly. Two commodities have been added to the Food Cost Index. They are butter (lb.) and Cheddar cheese (lb.). These replace frying oil and frying shortening.

		% Change	
	11/86	10/86	11/85
Hamburger (lb. 85% lean)	$1.25	-3	-1
Chicken (lb. cut for frying)	.96	5	-1
N.Y. strip steak (lb./avg.)	3.44	-10	-6
Bread (Pullman loaf)	.78	-1	-4
Lettuce (iceberg/head)	.54	-2	10
French fries (30 lb.)	12.04	1	-3
Tomatoes (lb.)	.52	0	4
Milk (gal.)	1.89	8	-1
Eggs (doz.)	.74	1	0
Peaches (case/#10)	18.62	9	-15
Peas (case/#10)	12.35	3	-24
Frozen beans (30 lb.)	14.33	-12	-15
Ice cream (vanilla/gal.)	3.37	5	-11
Butter (lb.)	1.69	—	—
Cheddar cheese (lb.)	1.78	—	—
Sugar (100 lb.)	30.50	-3	1
Coffee (lb.)	2.99	3	5
Breaded fish portions (lb.)	1.65	2	19

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WHAT DOES "LIGHT AND HEALTHFUL" MEAN?
Here is what our readers told us:

- White meats, lots of veggies and nothing your mother ever cooked when you were young!
- Lean meats, light sauces, simple starches, fresh salads, broiled fish, willingness to cook to customers' special needs.
- Any and all foods that contribute to long and healthy lives.
- Balanced nutrition: smaller portions, lower calories.
- Foods that are low in calories, carbohydrates, cholesterol and sodium but also are healthful and eye-appealing.
- Food that is prepared in such a way that calories, fat content (saturated) and greasiness is reduced.
- Foods that give rather than take energy, vitamins and other nutrients. Foods that make customers "feel good" for longer than the mealtime.
- Homemade soups served with salad for lunch; fruit juice, cereal and toast for breakfast.
- Entrees with less than 300 calories; fruit and vegetables as an important part of meal.
- Food that is a concentrated source of nutrients and lower in calories, sodium; fat with a protein source other than red meat. Not heavy. Low in simple carbohydrates high in complex carbohydrates.
- Food that contains nutrients and is filling but not too filling.
- Any food which contributes to one's own health.
- Good, attractive, nutritious food that tastes as good as it looks!
- Food from all four food groups including lean meats, low-fat dairy, fresh fruits and vegetables, light natural sauces and flavors.

■ MENU SURVEY

Who's on the Fitness Food Bandwagon?

Survey respondents tell *R&I* how healthful eating affects them.

Whether the healthful eating trend continues or not, foodservice operators think it will and their menus reflect that belief. In the June 11, 1986, issue, *R&I* looked at the current interest in light and healthful eating and offered a collection of nutritionally analyzed recipes. We also asked you, our readers, how you feel about the light-eating trend and whether it has affected your menu planning.

The survey results show that a resounding majority believe the light-eating trend will continue, at least into the near future. Respondents also said that this trend is making an impact on what they serve and how they describe menu offerings. With the exception of some fast-food restaurants and schools, well over half the respondents said they: make an effort to reduce salt in cooking, offer whole-grain breads, have sugar substitutes available, serve decaffeinated coffee, offer low-calorie salad dressings, offer vegetarian dishes and offer fruit juices on the menu. Many operators also said they have a nonsmoking section and use low-sodium products in cooking.

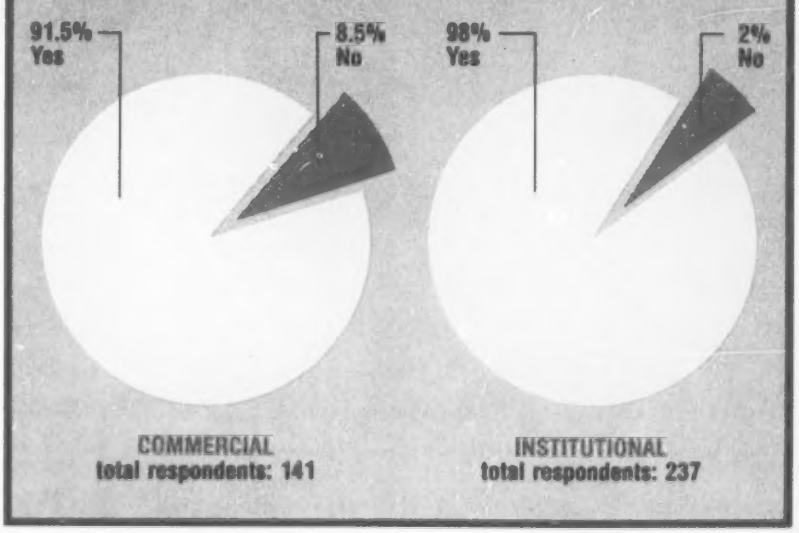
Of those that responded, only 31% of commercial operators were part of a chain, and even less of the institutional operators, 26%, were part of a chain. The four regions, Northeast, West, Central and South were all well-represented, although slightly more of the surveys came from the Central region.

—N.B.

■ R&I DATA

LIGHT-EATING TREND LIKELY TO CONTINUE

Survey respondents almost were unanimous in thinking that the light-eating trend will continue. Both commercial and institutional operators said that the healthful-food trend is here to stay, although institutional respondents were slightly more likely to answer affirmatively.



RESTAURANTS & INSTITUTIONS

HEALTHFUL MENU OPTIONS A HIGH PRIORITY IN FOODSERVICE ESTABLISHMENTS

Survey respondents were asked to check the light-and-healthful options offered in their establishments. In all segments of foodservice, operators claimed they consider nutritional aspects of food when planning menus and offer healthful choices to their patrons.

	Upscale	Midscale	Fast food	Hotel/ Motel	Health care	School	College	B&I
Make an effort to reduce salt in cooking	79.4%	73.1%	42.5%	85.7%	90.3%	100.0%	78.9%	79.0%
Offer a healthful section on the menu	50.0	41.5	32.5	64.3	52.4	59.1	53.6	68.0
Have a non-smoking section	35.3	60.4	37.5	57.1	73.1	18.2	75.0	84.0
Use low-sodium products in cooking	41.2	18.9	25.0	35.8	60.0	27.3	17.9	31.6
Enlist help of nutritionist in planning menu	23.5	17.0	7.5	21.4	89.7	59.1	67.9	57.9
Tie in light-and-healthy promotions with menu	23.5	32.1	30.0	28.6	39.3	41.0	42.9	68.4
Offer whole-grain breads	58.8	58.5	42.5	85.7	91.7	81.8	82.1	94.7
Serve non-alcoholic beverages	79.4	71.7	62.5	92.9	73.1	54.6	89.3	89.5
Have salt substitute available	29.4	39.6	22.5	35.8	63.5	13.6	39.3	26.3
Have sugar substiiute available	88.2	92.5	70.0	92.9	95.2	45.5	89.3	100.0
Serve decaffeinated coffee	100.0	96.2	57.5	100.0	93.8	31.8	82.1	94.7
Offer low-calorie salad dressings	52.9	56.6	42.5	50.0	86.2	68.2	89.3	94.7
Offer reduced-calorie entrees	47.1	45.3	35.0	57.1	73.1	27.3	42.9	84.2
Offer reduced-calorie desserts	26.5	20.8	10.0	42.9	74.5	45.5	39.3	63.2
Offer entrees intentionally reduced in fat and cholesterol	61.8	64.2	45.0	71.4	72.4	41.0	60.7	68.4
Offer calorie or nutrition information on the menu	17.7	17.0	17.5	21.4	42.8	27.3	60.7	73.7
Offer portion-size options	32.4	37.7	30.0	35.8	59.3	36.4	42.9	31.6
Offer vegetarian dishes	79.4	69.8	52.5	71.4	63.5	59.1	75.0	82.4
State willingness to cook to order on menu	70.6	35.9	17.5	50.0	14.5	4.5	17.9	15.8
Offer fruit juice options on beverage	52.9	58.8	37.5	64.3	74.5	59.1	67.9	84.2

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ACTION EXPRESS

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ADVERTISING INDEX

For more information on the products advertised and featured in this issue, circle the number indicated on the Reader Service Card.

Advertiser	Inquiry No.
A.1. Steak Sauce, Del Monte Foodservice (p.118-119)	39
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